

# Best Practices in Project Planning and Implementation

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# Discussion Topics

1. Introduction
2. Ten Best Practice Areas
3. Governance/Stage Gates
4. Business Case Evaluations
5. CIP Prioritization
6. Community Engagement

# Ten Best Practice Areas

1. **Governance/Stage Gates**
2. **Business Case Evaluations**
3. Project Cost Estimating
4. **Project Prioritization and Selection**
5. Contracting Approaches
6. Rate Setting and Funding Strategies
7. Comprehensive, System, and Basin Planning
8. **Community Engagement**
9. Project Management Plans
10. Project Commissioning

# What are Best Practices?

- Proven methods to accomplish something
- Not necessarily perfect practices
- Need to be documented
- Provide direction or guidance for a consistent and disciplined approach
- Successful organizations develop their own Best Practices
- Help define a vision to use as a target for your organization

# Project Governance/Stage Gates?

Good Governance helps to Make Decisions Stick

- The right people (decision makers)
- At the right time
- Provided with the right information
- Check-ins later as appropriate/requested
- Provides for re-direction if warranted

# Two main life cycles to consider

## Asset Life-Cycle



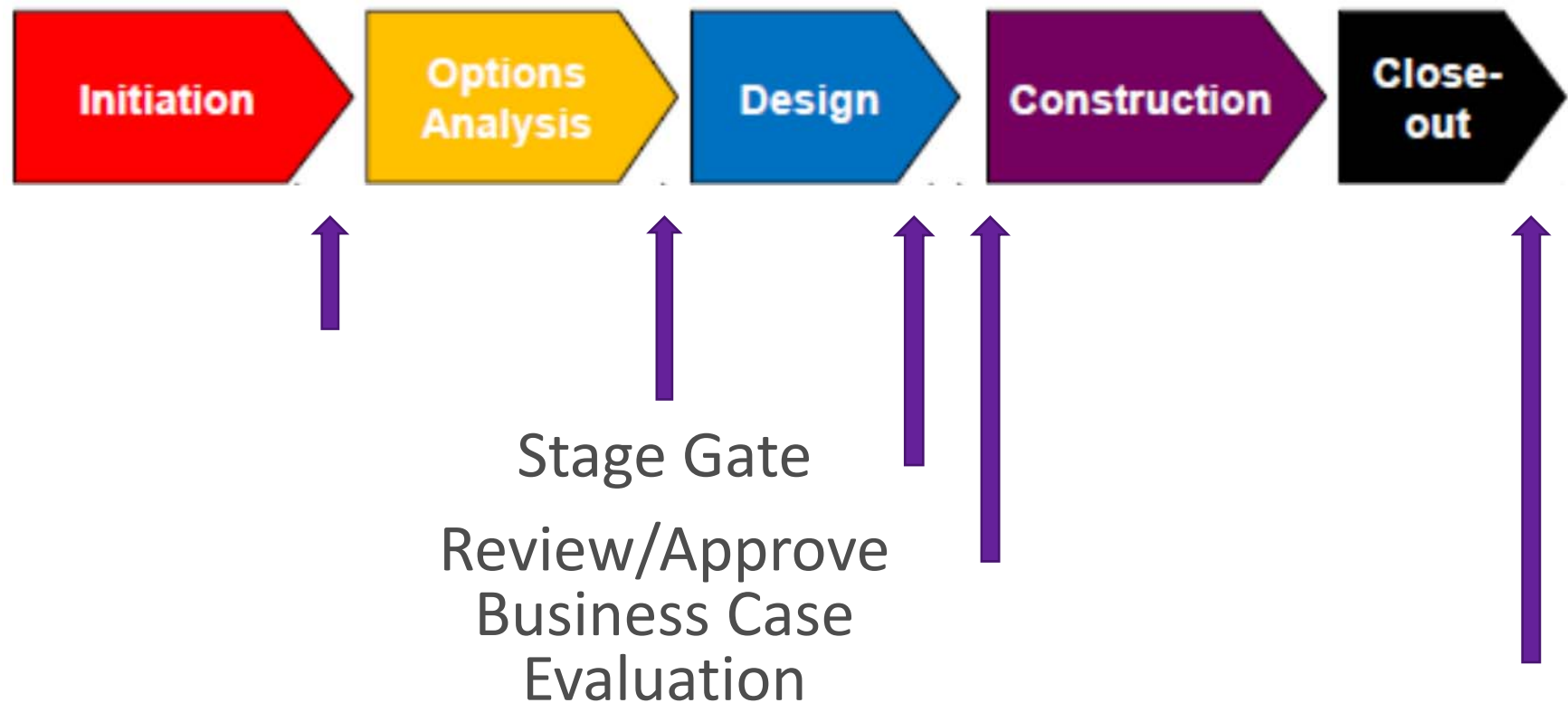
## Project Life-Cycle

# Project Life-Cycle



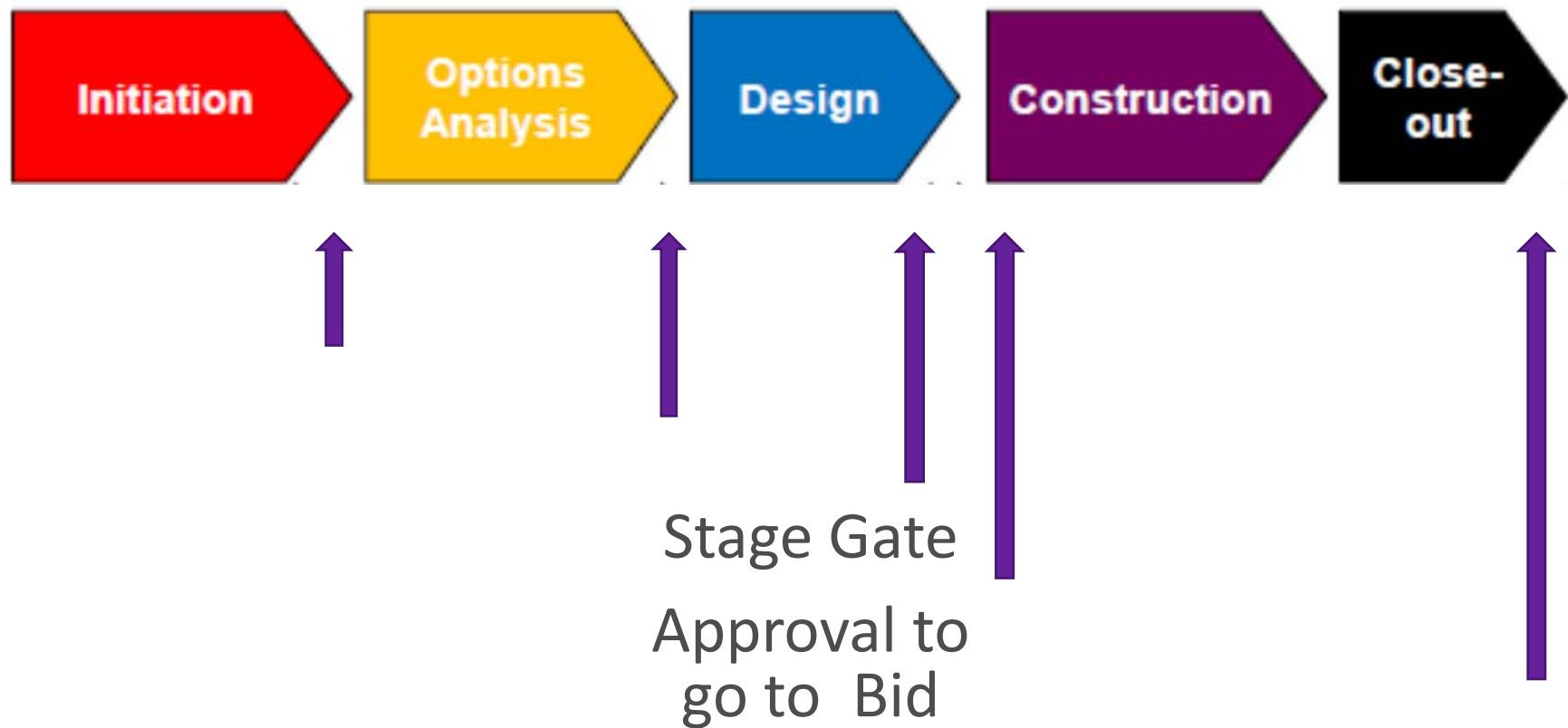
- Stage Gate
  - Allow investment onto CIP
  - Approve Spending for Options Analysis

# Project Life-Cycle

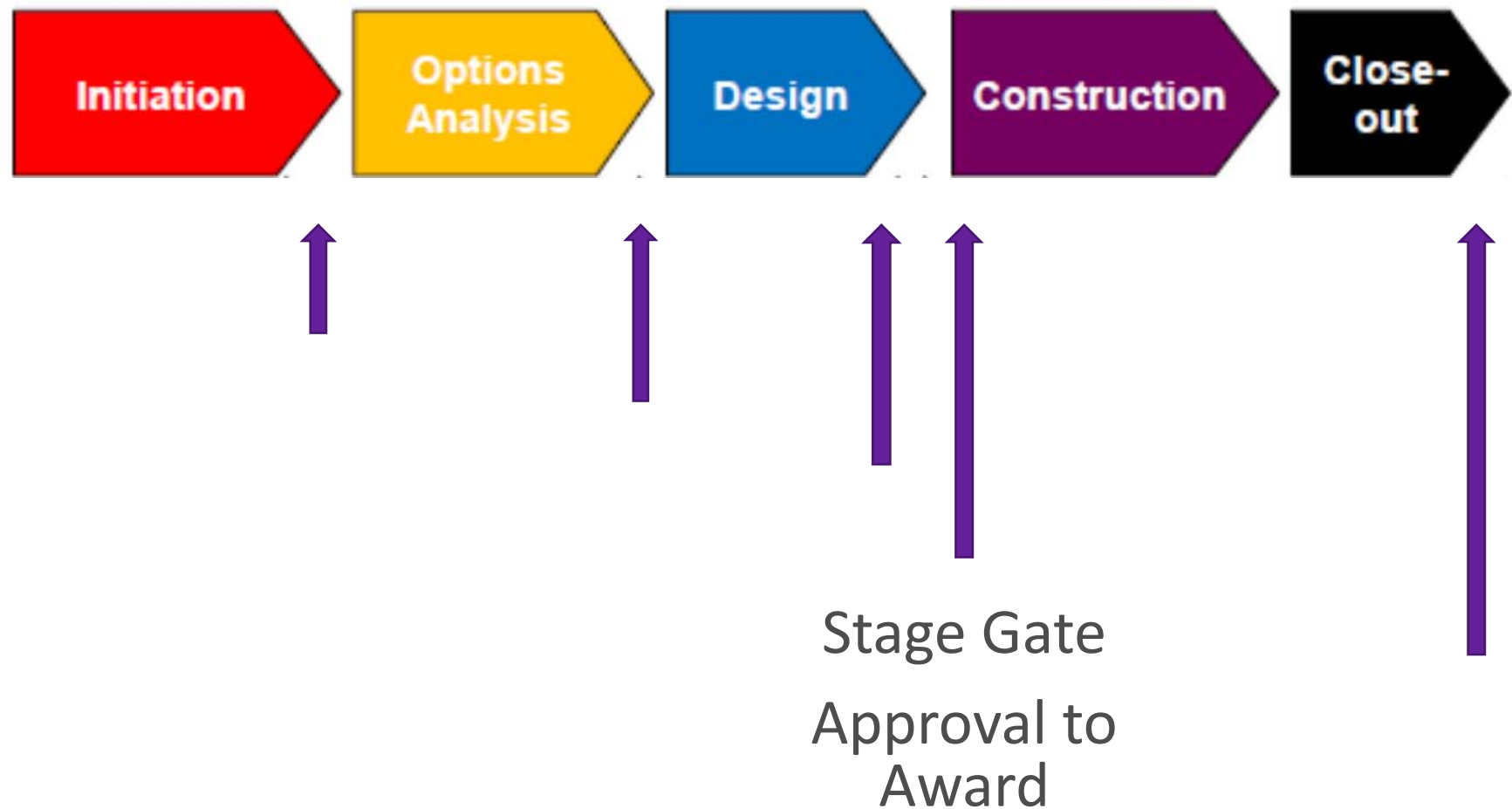




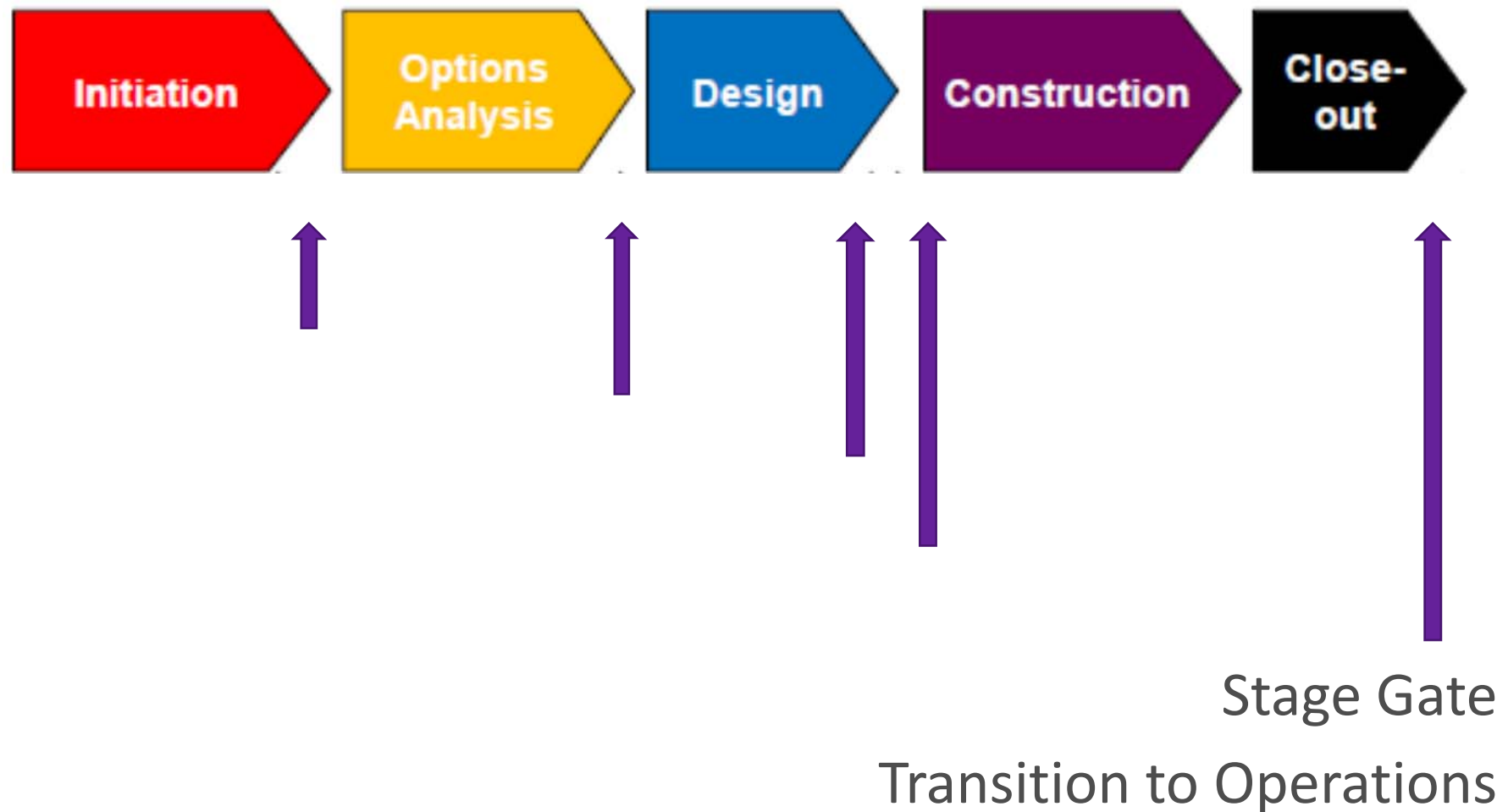
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# Project Life-Cycle



# What is a Business Case Evaluation?

A rigorous, uniform approach to assist in decision-making through systematic evaluation of potential alternatives to solving identified problems.

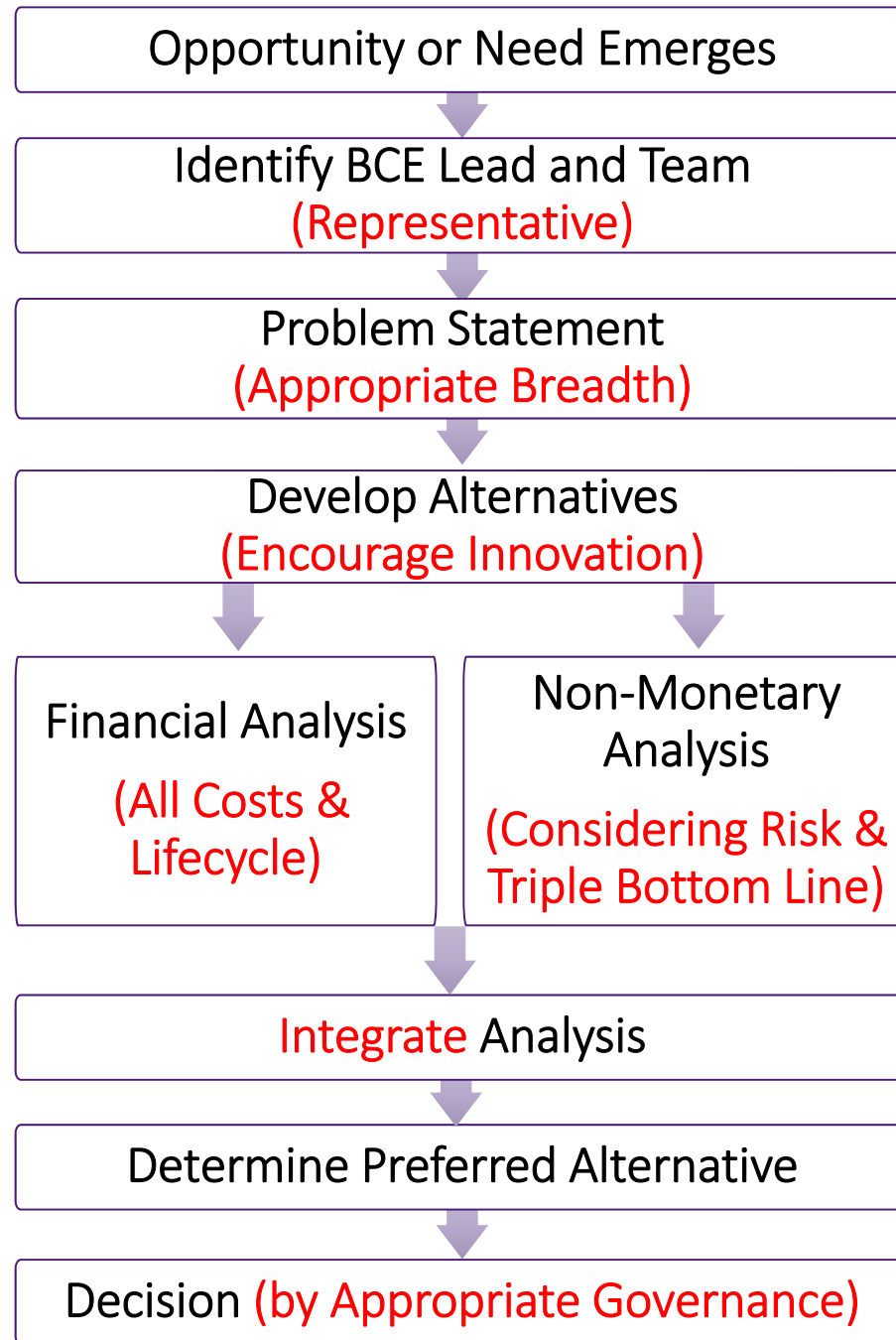


# Why do BCEs?

Leads to  
Decisions that  
Stick

- Deliberate Problem Definition
- Incorporates Multiple Perspectives
- Encourages Innovation and Creativity
- ID Lowest Cost Solution
- Generates a Communications Framework
- Transparency and Credibility
- Aligns to Organizational Objectives
- Staff Buy-In
- Rational Decision Making to take to Stakeholders

# Fundamental Components of Best Practice BCEs



# Community Engagement



# Principles of Community Engagement

- Start early and communicate often
  - Build understanding of the problem or opportunity - need for the project
  - Engage the community in alternatives (think out loud, with the public)
  - Build trust by showing that you're listening
- Explore and choose the right engagement tools
  - Public meetings & open houses - venue is important
  - Focus groups, steering committees for complex projects
  - Use WEB tools, newsletters and flyers



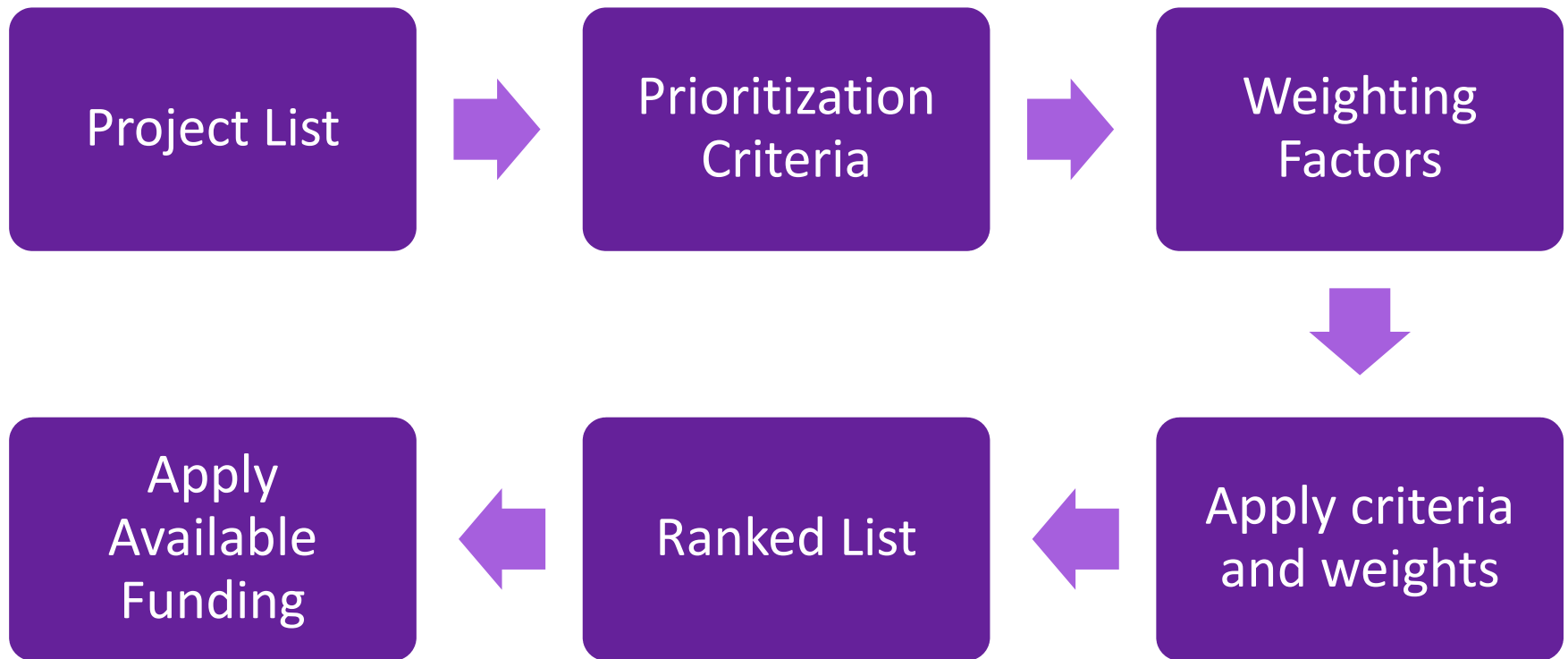
# Principles of Community Engagement

- Learn about and use “Informed Consent”
  - There is a serious problem or important opportunity
  - Our agency is responsible for addressing it
  - The approach we are using is reasonable, sensible, responsible and equitable.
  - We are listening. We do care.
- Include communications experts on your project team
  - Translation of technical concepts into lay language
  - Strong facilitation of public meetings is critical

# CIP Funding and Project Prioritization

- 6-Year Capital Improvement Program (CIP) Development
- Factors to consider:
  - Size and complexity of your CIP
  - Different business areas and fund types
  - How to involve your project staff
  - Expectations of elected officials and stakeholders
- Prioritization Criteria
- Weighting Factors

# CIP Funding and Project Prioritization



# Prioritization Criteria – Example

1. Infrastructure preservation & replacement to mitigate risk of failure
2. Ability to maintain and enhance the City as a desirable place to be
3. Enhances health and safety of the public
4. Protect, maintain and restore environmental quality
5. High leverage value
6. Meets local, state and federal mandates and regulatory requirements

# Summary



Thank You!

Linda and Liz

**Questions?**



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